



State of Montana Project Management Office

Project Delivery and Closure Phase

Performance Appraisal Process Instructions

A process and forms that can be used to promote recognition of project performance as part of someone's normal performance appraisal each year. This template addresses both individual team members and project leaders.

A common complaint by project leaders is that individual team members are rewarded by the company for their performance in their functional area, such as engineering, marketing or manufacturing. Their review often doesn't take into account whether or not they contribute well to a project and, of course, project leaders would like to be rewarded for the substantial efforts they put into this role.

The following pages contain:

1. An overview of how the project performance appraisal can be implemented.
2. Guidelines for collecting the appraisals from project team members.
3. Sample forms for project leaders and team members.

Follow the suggested processes, using the included forms. They are meant to provide additional inputs to your existing review process, rather than replacing it.

Process for Project Leader Performance Appraisal Input

OVERVIEW

1. **When used:** These forms will be filled out when the particular team member is leaving the team, not necessarily at the very end of the project. Performance will, therefore, be fresh in appraiser's mind.
2. **How the feedback will be used:** The expectation will be set with functional managers that they must incorporate feedback from project leaders in people's annual review:
 - They would have these forms on file for projects completed in the last year.
 - They would be expected to solicit some kind of input from project leaders of current projects the person is on (but it doesn't have to be this form).
3. **Who should be reviewed:** All those designated as team members on the team roles list should be reviewed, even if they are not full time team members. Any appropriate notes about their level of involvement can be included on the form.

Process for Conducting a Team Member Project Performance Appraisal by the Project Leader

1. When a person is about to leave the project, the project leader will fill out an appraisal form for them.
2. The project leader will then give a copy to the person and give them the option to schedule time to discuss it. (If the appraisal is negative, it is assumed that they will discuss it together.) The discussion could be a three-way meeting with the functional manager and project leader.
3. The person will sign to indicate that they have seen the form and had a chance to review it (or elected not to review it) with the project leader.
4. The project leader will give a copy of the signed form to the functional manager to be filed for the person's next review (and for any current issues to be addressed in the near term).

Process for Conducting PM Project Performance Appraisal by a Team Member

1. When a person is about to leave the project, they will fill out an appraisal form for the project leader. The form can be anonymous.
2. The person will give the form to the project leader's functional manager.
3. The functional manager will review the forms with the project leader. (The functional manager will be responsible for protecting the anonymity of the team member.)
4. The project leader will sign, indicating they've reviewed the form, and the appraisal will be filed for the next performance review.

Administrative Information

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